Footyweb National Registration User Guide

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How to access your Online Membership Database

To access your Association or Club database, click on the link below:
https://reg.foxsportspulse.com/

To log in to the database you will need to have an SP Passport. You can either Sign In to your SP Passport if you have an existing account or Register for an SP Passport.
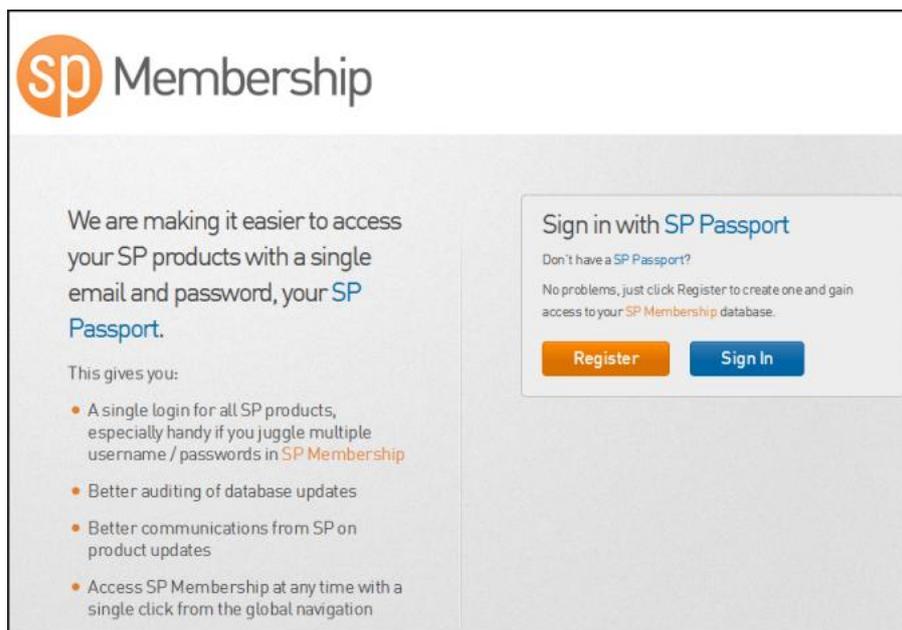
If your SP Passport has been linked to your Association or Club database you will see the **Membership and Results Entry** link (shown below) which should allow you to then access your database.

If you don't have the Membership link your Association or State Contact will be able to link your database to your passport.

How to preview the Registration Form

As you are setting up the Registration Form, you should regularly preview the form to make sure it is set up and displaying as needed:

1. Hover over the **Registrations** menu and click **Registration Forms**.
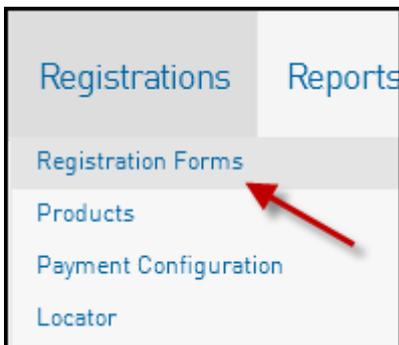
2. Click on **View** for the form you wish to view.
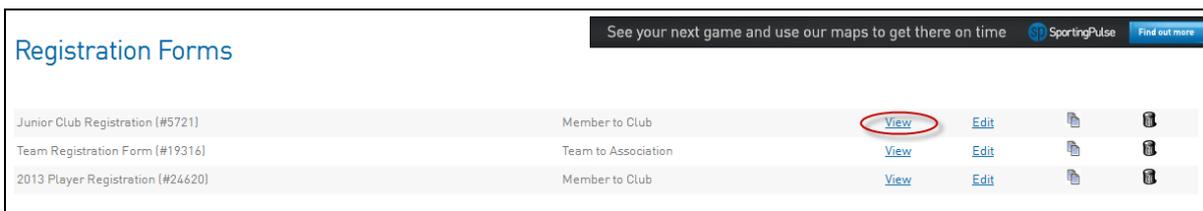
3. You will see the registration form login screen (this is what your members will see – you will need to log in with an existing member's username and password).

4. Leave this screen open so that when you make changes in the admin section, you can refresh the screen to view your changes live.

How to Link Registration Form to National Form

To merge your current or existing registration form to the National form follow the instructions below.

1. From the dashboard menu hover over **Registrations** and click **Registration Forms**
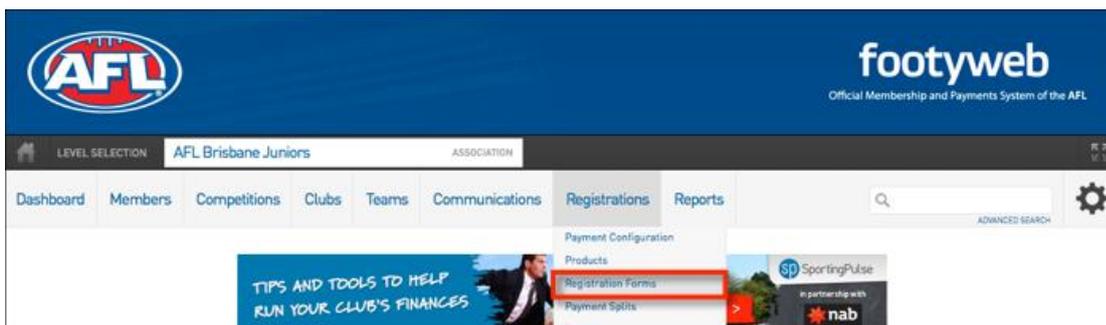
2. Locate your existing registration form and click **Link**
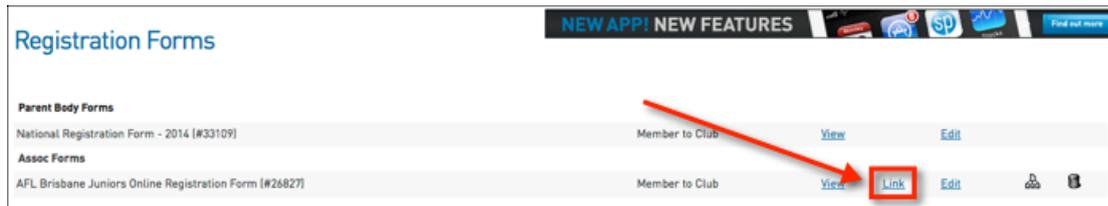
3. A light box will open with the forms that you can link to. Click **Select** next to the National Registration Form.
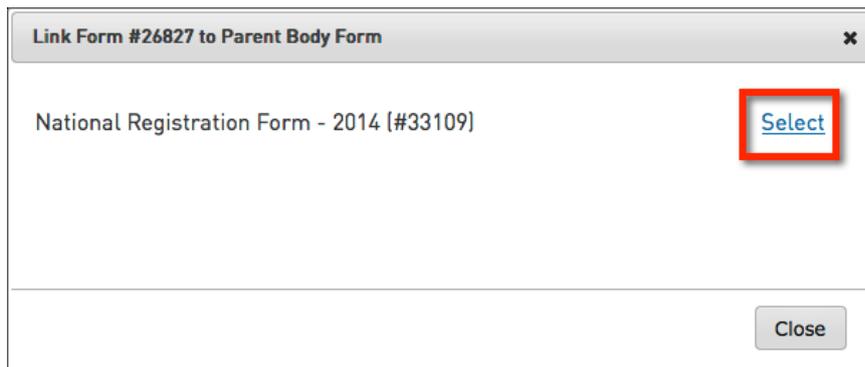
4. You will then notice that the form has been placed directly under the National form and the form has merged the form numbers together.

5. You can then reverse this process by clicking on the **Unlink** button.
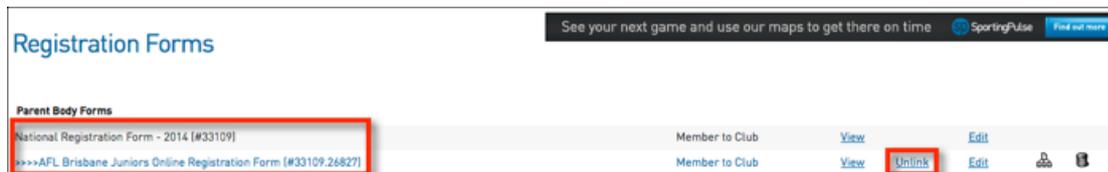
NOTE: If you have a registration widget setup on your website it will automatically redirect to the form that you have linked the original to.

Mark Form as Primary

You can now mark a form as your **Primary Registration Form.** This will then become the only form that members can register to your club or association. It will redirect all other form links to the primary form.

1. To set up a primary registration form you first need to hover over the **Registrations** tab and click **Registration Forms**
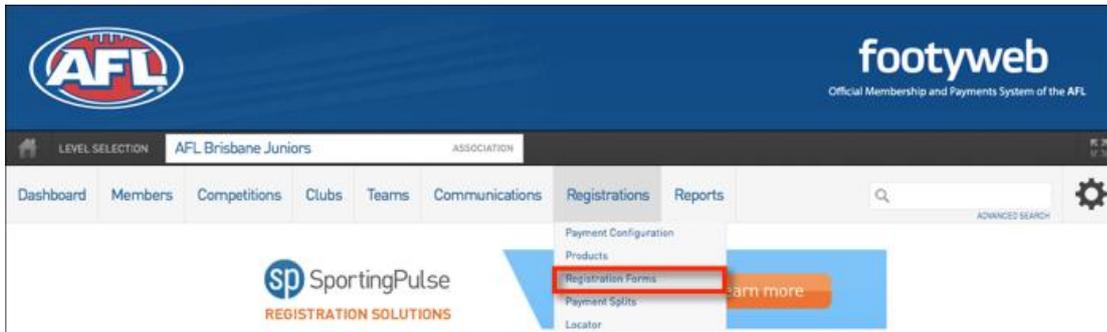
2. From the Registration Form menu click **Set Primary** on the form that you want to make your primary form. The National Registration Form will be the form that most administrators will make primary. If you have an existing registration form ensure you link it to the National form
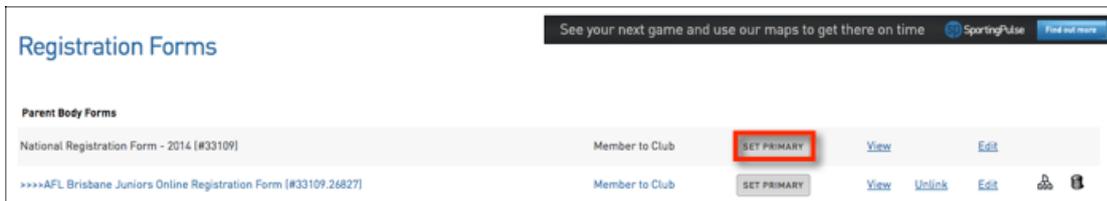
3. You will then notice the button will turn blue and say **Primary**
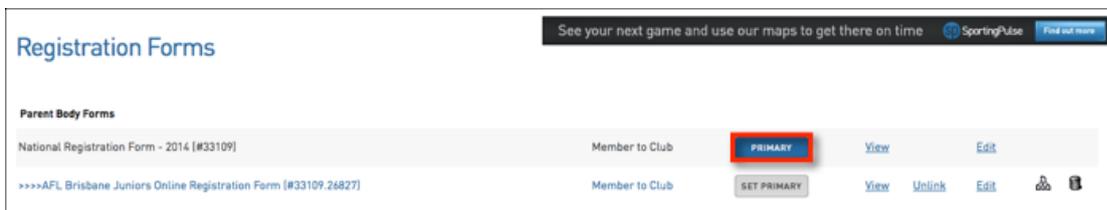
Publishing the Registration Form to your website

The below refers to clubs/associations with a FOX SPORTS PULSE website.

The FOX SPORTS PULSE Payments Registration Form - section allows your association or club's registration form to be easily accessed through an icon and link that sits in the right-hand column of your FOX SPORTS PULSE Website.

To publish your registration form on any website, you need the URL (web address) of your form. You can find it by clicking the "View" link in the Registration Forms configuration menu – the link will appear in the location bar. You can copy and paste this link on your website by following the directions below or you can also send this link to your members directly.

To link your form to your website:

Option A (Adding the form as a link on a full page)
To add your Registration Form as a Full Page on your website, log in to your FOX SPORTS PULSE Standard Website.

1. Click on the **Content Manager** in the Manage Content section
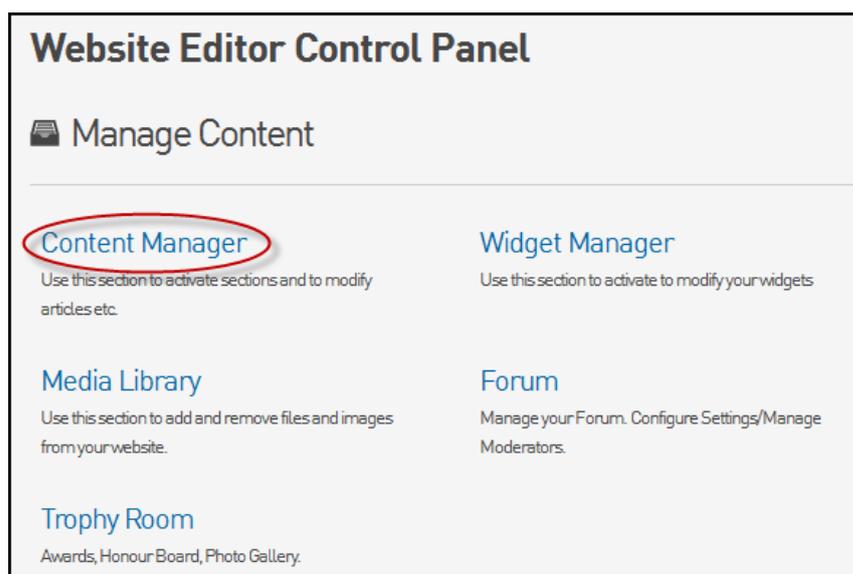
2. From the **Add New Section** drop down list, select **Full Page** and click the **Add New Section** button
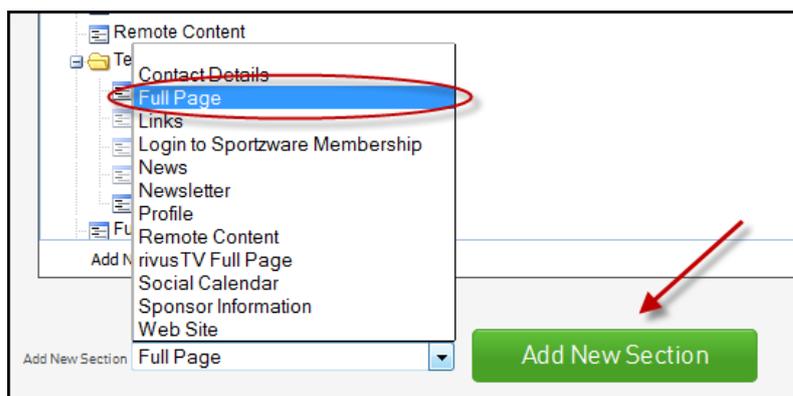
3. Right click on the section you've just created and click **Edit**
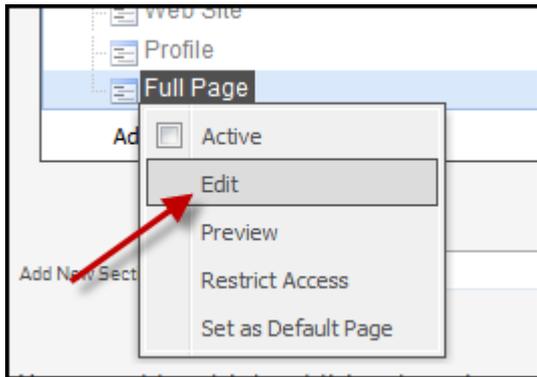
4. Enter in as much information as you like and include the link/URL for the Registration Form on the page.
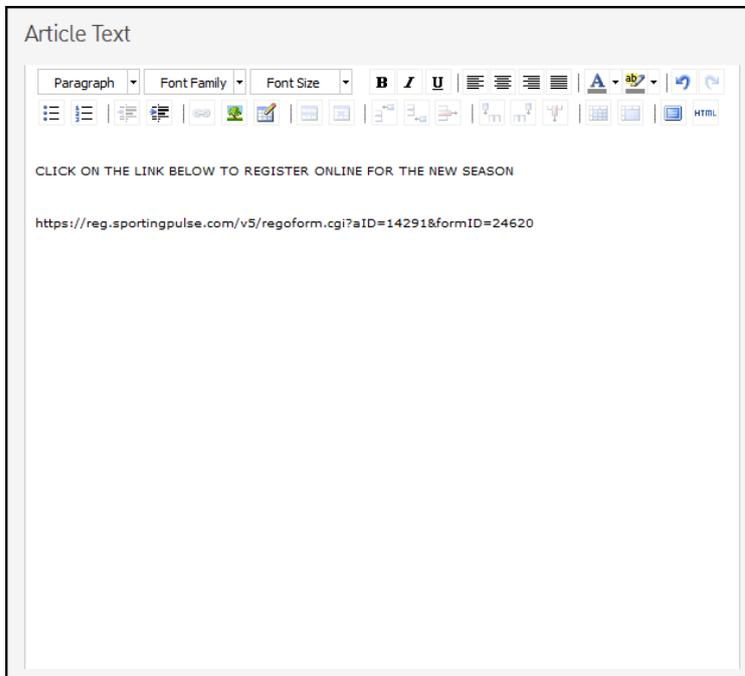
5. Click the **Save** button when finished

6. Return to the **Content Manager**, right click on the section you've created and tick the **Active** box.
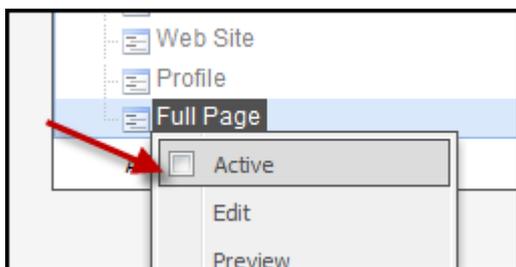
7. Your page will now display the link and any other information you've included on your website for your members to view and access the online registration form.

Option B (Adding the form as a widget)

To add your Registration Form to your website as a Widget, log into your FOX SPORTS PULSE Standard Website.

1. From the **Website Editor Control Panel**, click on **Widget Manager**.
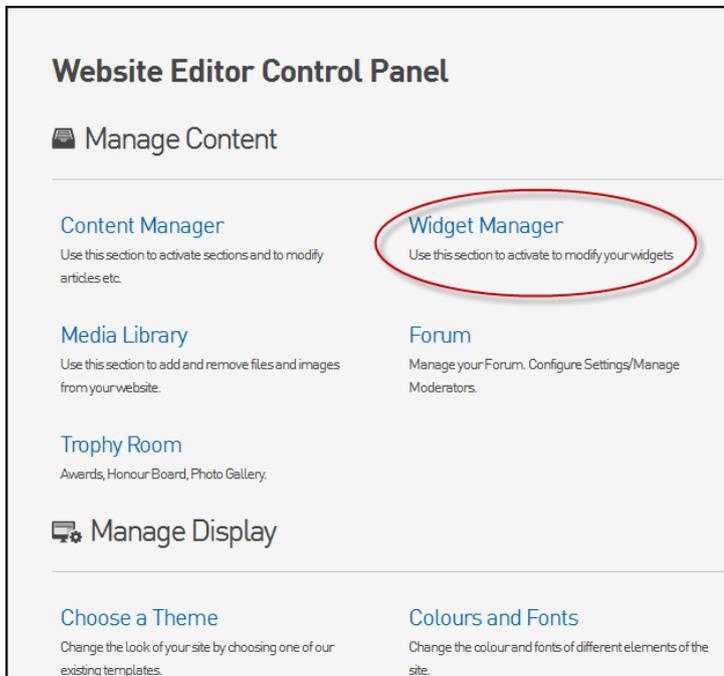
2. Click on the **Add New Widget** drop down list, select **Register Now** and click on **Add New Section**.
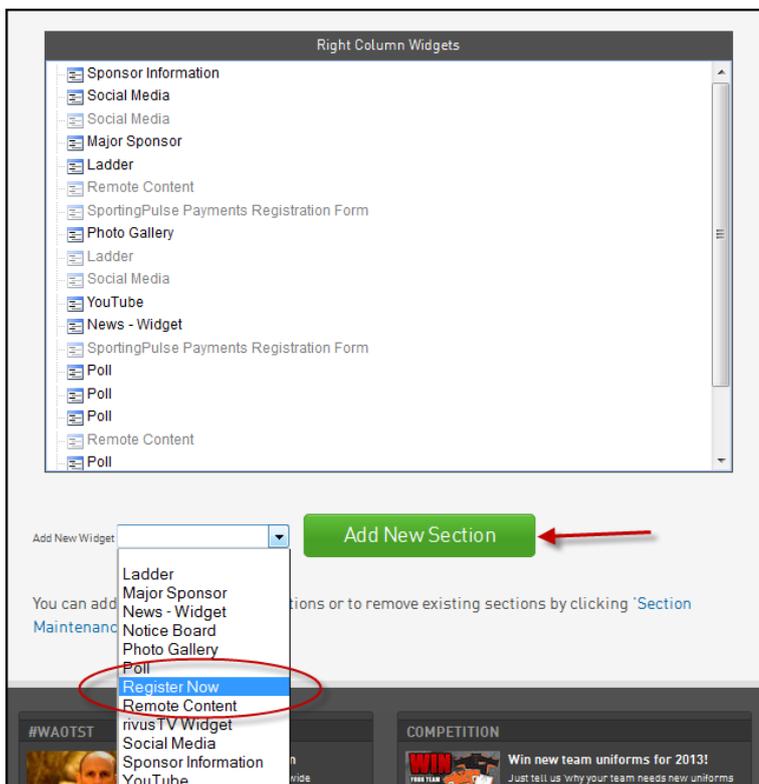
3. **Right click** on the **Register Now** section and select **Edit** from the menu.
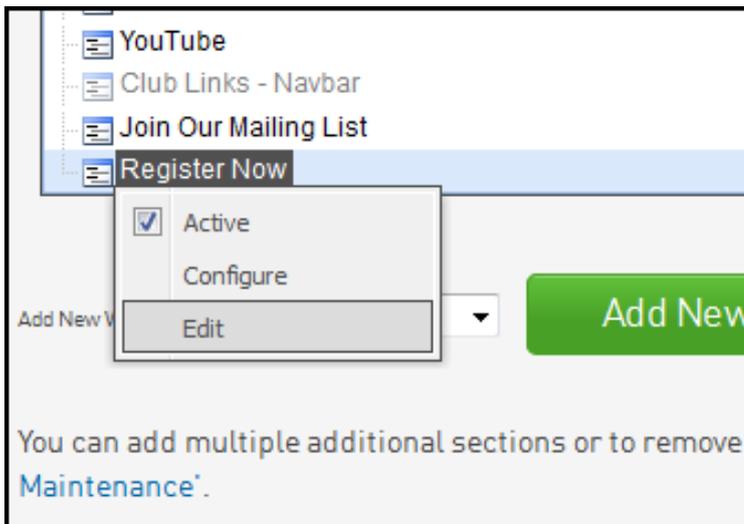
4. At the next screen you can enter a **Link Caption** which is what will appear under the icon in the Right-Hand column of your website and this should describe the form the user will see when they click on the link.

5. You will also need to enter the **Form Number** associated with the registration form that you wish to appear (the form number can be found from the Registration Form menu in your database as shown below).


6. You can also **Browse and Upload** or **Insert an Image File/Image from Gallery** that will appear as the icon that users will click on to see the form in the Right-Hand column of your site. If you do not do either of these the default icon will be used.

7. Finally click **Save** to save the changes.

8. Now that you have saved these changes you need to activate the section. Return to the **Widget Manager** and Right-Click on the **Register Now** section. Check the **Active** box then click **Save/Update**
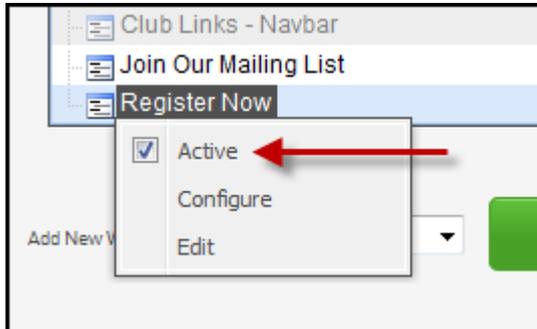
9. Return to your Homepage. You will see the **Register Now widget** appear in the Right-Hand column. If you have chosen not to Browse and Upload or Insert an Image File/Image from Gallery then the default icon will appear as per the screenshot below. When users click on this icon they will be taken to the relevant form.
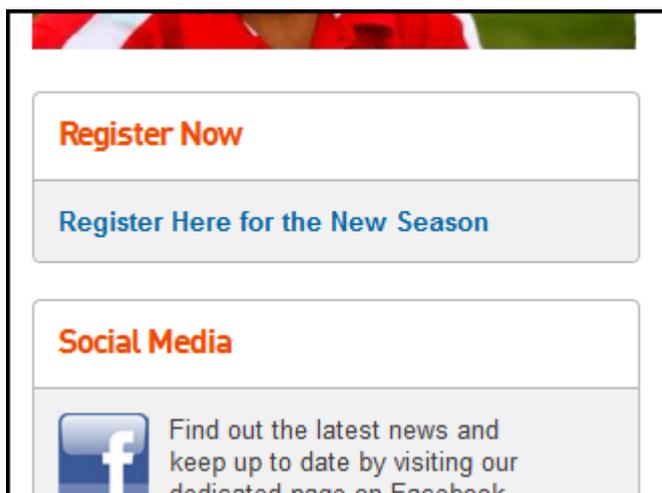

How to add Custom Fields to your Registration Form

To add Custom fields, as a club, you will need to speak to your Association/League and give them specifics of the field you require.

It may be that a similar field already exists in the database, and they can make it available to you (eg. "Medical Notes" instead of "Health conditions").

If not, the league/association will need to create/label the custom field information, and then make the custom field available.

If they have difficulty doing so, have them contact FOX SPORTS PULSE support for assistance

How to Add Your Own Terms & Conditions

The National registration form will come with the National Terms & Conditions. You can also take the option to add your own.

1. From the dashboard menu hover over **Registrations** and click **Registration Forms**
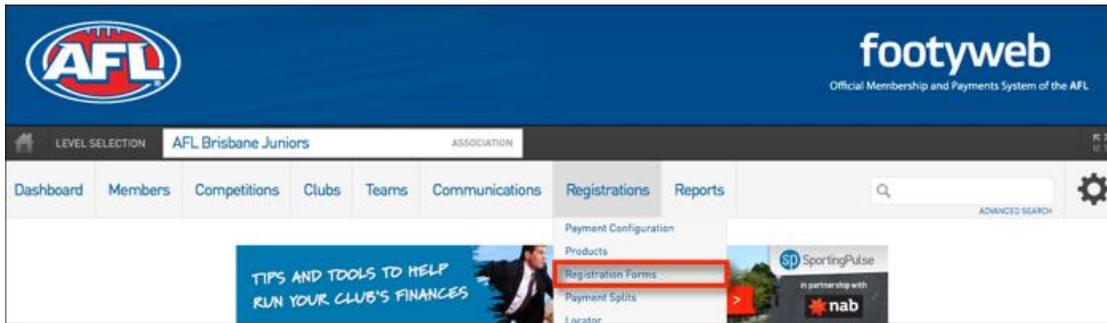
2. From the Registration Form menu click **Edit** on either the **National Registration Form**
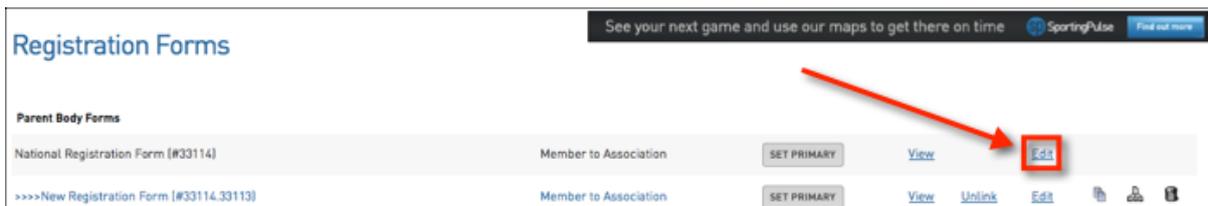
3. Then click on the **Messages** tab
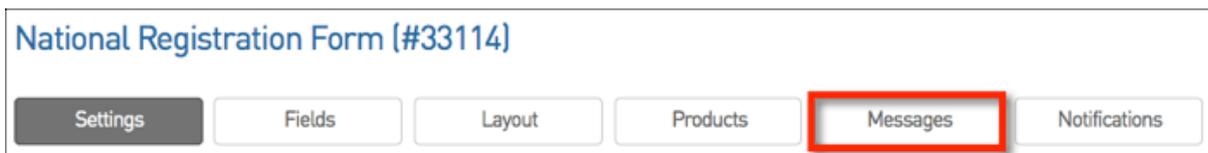
4. From the next menu click on the **Full Information** tab
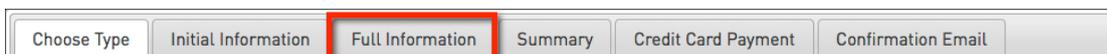
6. The next step is to scroll down to the Terms & Conditions section
    i. The first step is to add a header (optional) in the small box at the top
    ii. Secondly, add in your Terms & Conditions into the larger box

This is where any Terms & Conditions should be entered, the smaller of the two boxes being for an optional header.

The T&Cs will appear at the very bottom of the 'Full Information' page, under the product selection area.

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7. Once the fields have been completed click the **SAVE** button

Save

How to apply to become a FOX SPORTS PULSE Sub-merchant

This step-by-step guide will help new users through the process of signing up to become a FOX SPORTS PULSE Sub-merchant via the NAB Bank. It's specifically designed for FOX SPORTS PULSE users, and includes some advice on how to fill in the different sections of the sign-up form, and while these are generally correct for sporting clubs and associations, they should be read in conjunction with your organisation's individual requirements.

When you sign up as a FOX SPORTS PULSE Sub-merchant, you are able to receive payments via the FOX SPORTS PULSE Payments system:

1. Hover over the **Registrations** menu and click on **Payments Configuration**
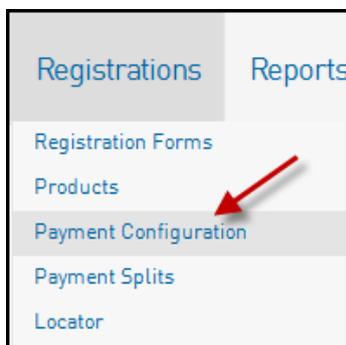
2. On the next page, select the **Payments Application** button
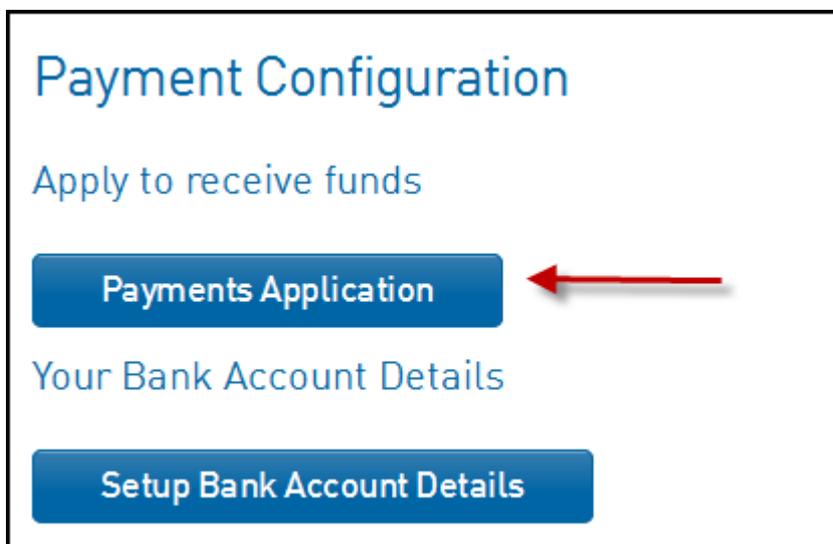
3. Fill in the details as required. It is a one page document and the fields with an asterisk next to them are required fields. Once all fields have been filled out, click the **I Agree** button.

Payment Application

Organisation Details

Legal (Trading) Name of Organisation:	
Have you previously applied for merchant status with NAB (through SportingPulse) for this Legal Name?:	
Shortened Business Name:	*20 characters maximum.*
Street Address 1:	*This may be your club room or place where you play. It cannot be a PO Box. Nothing will be posted here.*
Street Address 2:	
Suburb:	East Melbourne
State:	
Postal Code:	3002
Organisation Phone:	03 8676 6970
Is your organisation incorporated?:	*If Yes then an ACN or ARBN must be supplied.*
ACN (Australian Company Number):	123456789
ARBN (Australian Registered Business Number):	*Used for a foreign company registered in Australia*
Is your organisation registered for GST?:	*If Yes then an ABN must be supplied.*
ABN:	
What does your Organisation do?:	
If other, please list here::	

Applicant

Applicant Title:	
Applicant First Name:	
Applicant Middle Initial:	
Applicant Family Name:	
Applicant Position:	
Applicant Phone:	
Applicant Email:	

Office Bearer 1

First Name:	John
Family Name:	SportingPulse
Position:	President
Phone:	0400 000 000
Email:	sportingpulse@sportingpulse.com

Office Bearer 2

First Name:	
Family Name:	
Position:	
Phone:	
Email:	

4. Your details will now be passed onto FOX SPORTS PULSE and you will be notified once your Sub-merchant set-up has been approved. Once approved, you now have the ability to start receiving payments.

Setting up your Bank Account to receive payments

This step-by-step guide will help new users through the process of recieving thier funds, after being set-up as a FOX SPORTS PULSE Sub-merchant. The user has two options as to how they want to set-up thier account:

1. Go into your local NAB branch and apply for a **NAB Bank Account**. This account will allow you to receive funds within 3 business days along with free electronic transactions. For the most up to date benefits or further information please contact the FOX SPORTS PULSE Payments team.
2. Continue with your current Bank account. Funds will be transfered into the account at the end of the week.

Setting up the Bank Account details

1. Hover over the **Registrations** menu, click on **Payment Configuration** and select **Setup Bank Account Details**.
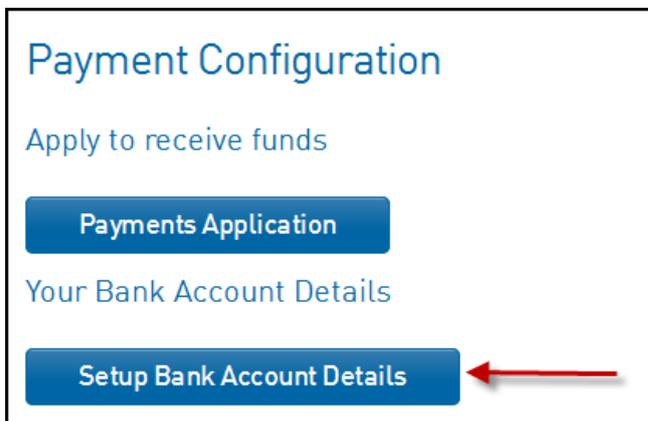
2. You will then be prompted to fill in your bank account details. Ensure these are correct as they will be locked once the update button is selected. If you need to make changes, please contact FOX SPORTS PULSE to have your account unlocked.

3. Click **Update**. The account setup is complete and monies will now be transferred into your selected bank account at the nominated timeframe.

How to Set Compulsory Payments

1. From the dashboard menu hover over **Registrations** and click **Registration Forms**
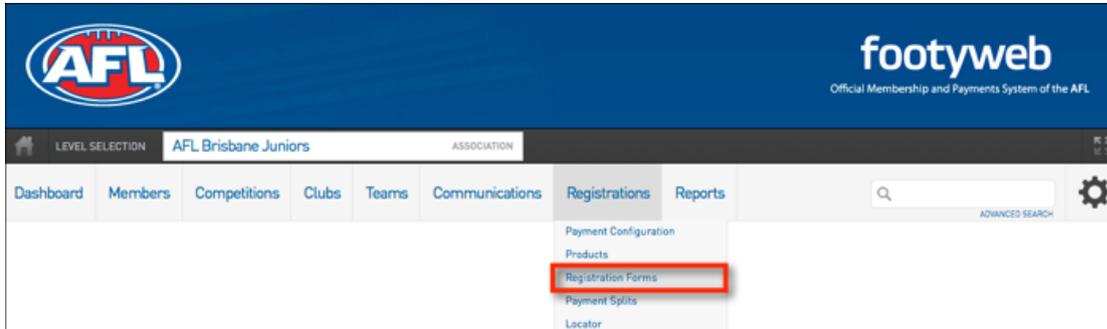
2. Click on the **Edit** button next to the **Primary Registration Form**

3. Within the **Settings** tab, tick the box to the right of **Payment is Compulsory**
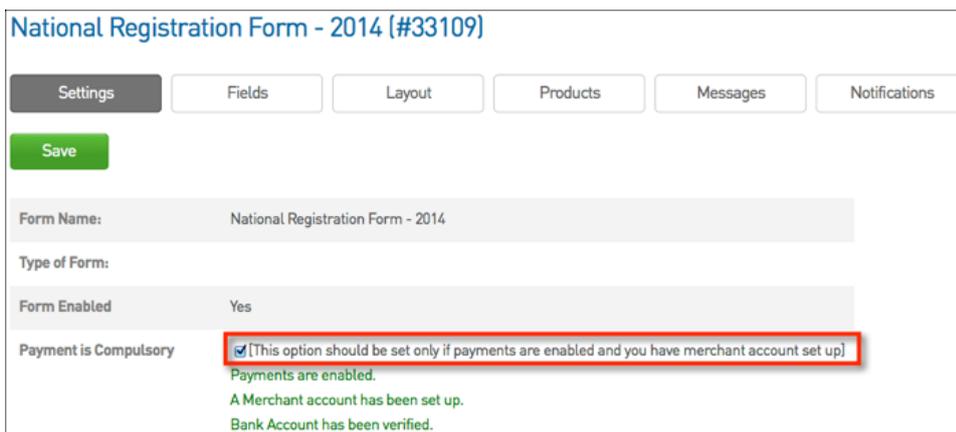
4. Once you have ticked the box click **SAVE** at either the top or bottom of the page

How to Create a New Product

Products are the items purchased by members in a member transaction. Common products include player registration/membership fees (E.g. adult membership, junior membership, and social membership), competition entry fees, and merchandise.

Typically this Pricing structure involves a flat individual fee, payable by each individual member when they register themselves to your club.

To get to the Products Menu:

1. Hover over the **Registrations** menu and click on **Products**
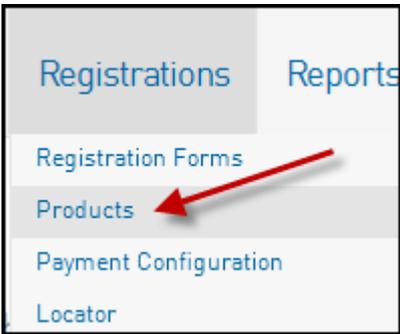
Make sure your product is clearly outlined as an Individual Member registration fee.

Make sure that the pricing is for an individual Member Registration Fee.

Fill in the relevant details (including pricing details) and click on **Update** to create the new product.

For further help on Product set up and the information contained with each of the Product Tabs click here

How to attach a Product to your Registration Form

To attach a Product to your Registration Form, follow the steps below.

1. Hover over the Registrations menu and click on Registration Forms.
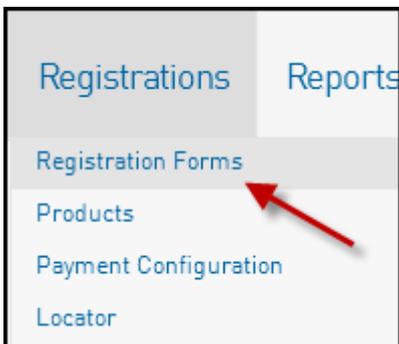
2. Click on Edit for the Registration Form you'd like to display products as shown below.
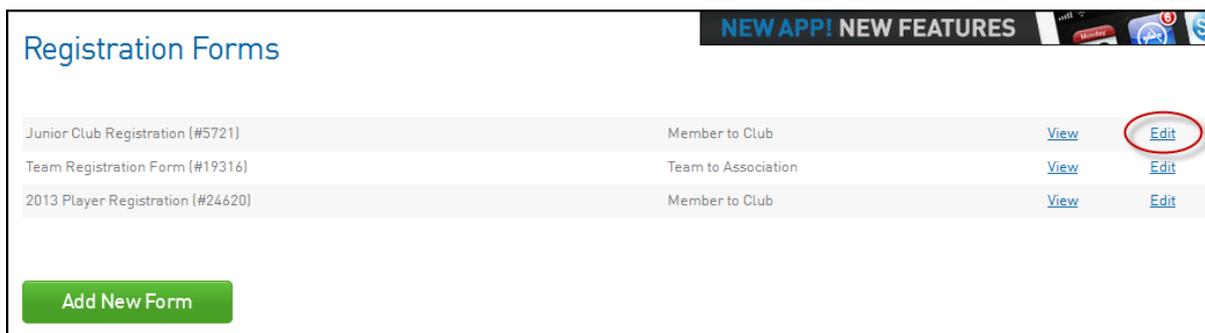
3. Click on the **Products** button across the top

4. For the Products you wish to have display on your Registration Form tick the **Active** box
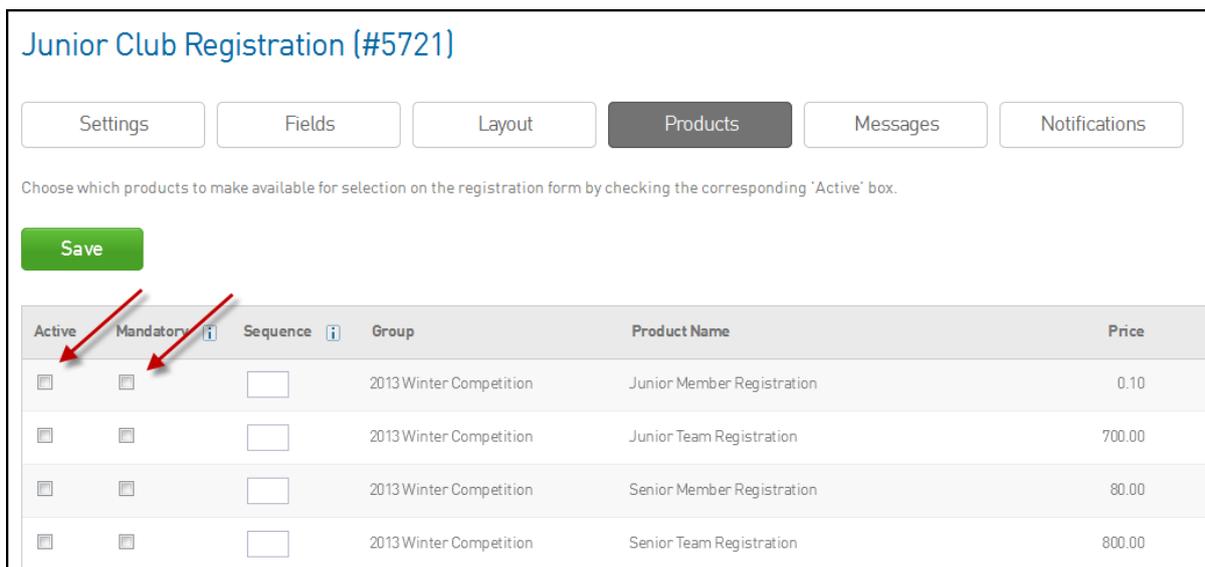
To make a product(s) mandatory tick the '**Make mandatory on form**' box.

Customising your Registration Form

This screen (Registration Forms menu) will display any registration forms you've created and will allow you to edit/customise them.
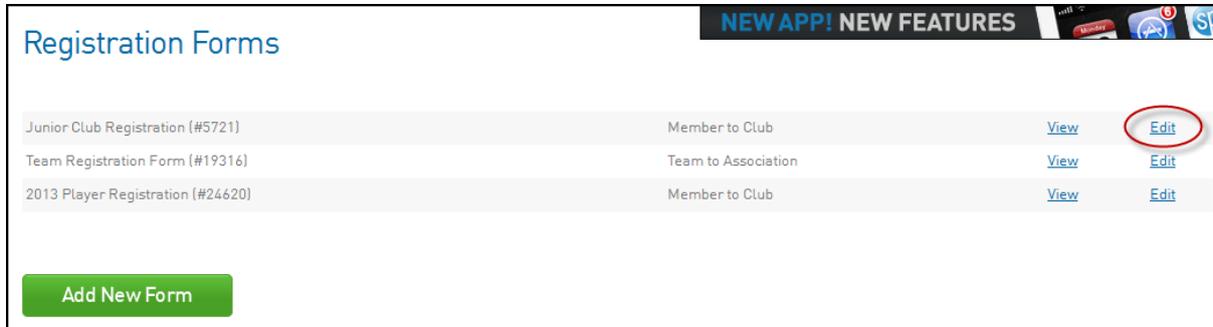
The **Edit** menu will bring up the buttons and menus shown below.
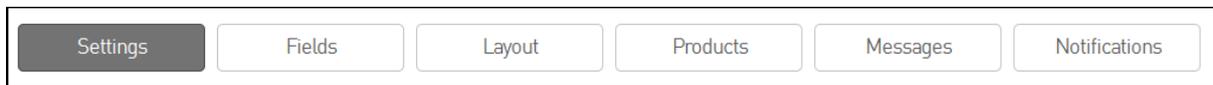
Registration Form Options

Fields:

- The screen below lists what options or 'fields' you can choose to display on your registration form

- In the below example, 'Legal First Name' (among others) is Compulsory which means the form can't be completed without filling out those fields. Some fields will locked by your league or State/National governing body.

- Editable fields will also display on the form, but they are optional to complete. Hidden fields will not display, read only fields are read only to the member.
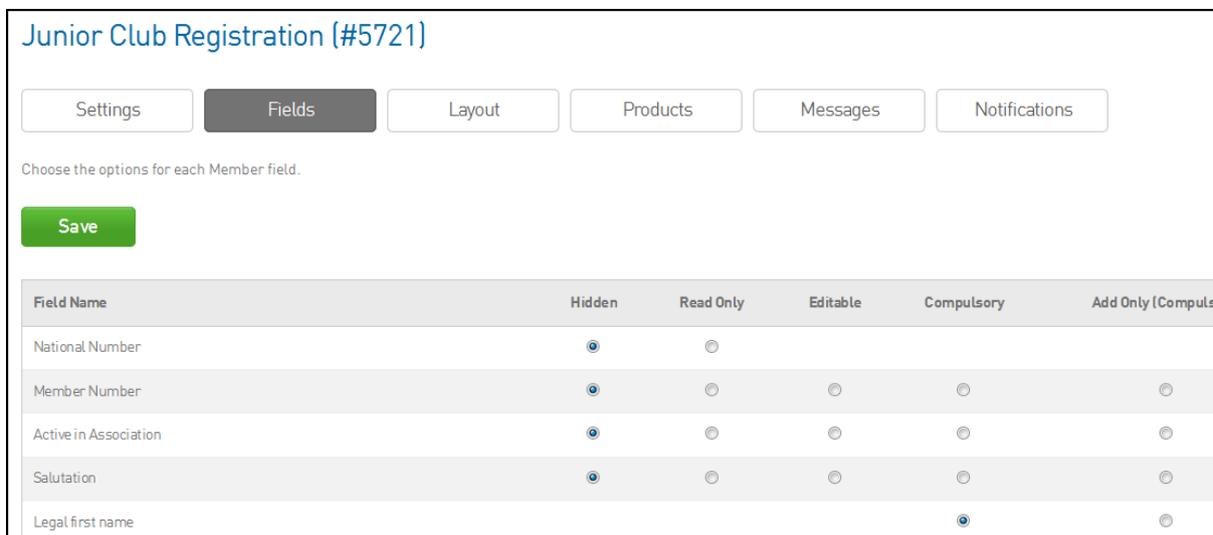
Layout:

- The **Layout** menu will allow you to alter the order of the fields on your Registration form, which you can do by clicking and dragging the specific field to where you'd like it to display, then dropping it in place.

- The **Add Text Block** and **Add Header Block** buttons will allow you to add a block of text or a heading above a particular field on your registration form. You will be able to edit and move these blocks around your form.

Text Messages:

- You can add in some further text to display at certain points of your registration form. Each of the boxes on this screen explains where your text will appear on the form

- The tabs across the top (highlighted in red on over the page) represent different stages of the Registration Form.

- The areas where text can be placed on a Registration Form will have an explanation of where the text will display ie. *This text will appear on the first page above the login section'*

Notifications:

The notifications menu will allow you to control all of the email notifications that are generated when a member registers, re-registers or purchases a product.

- Ticking the relevant boxes as shown below will give you the option to have emails sent to the Association, Club, Team, Member and Parent/Guardian when a member processes a Registration.
- The **eMails** box will alert you where the emails are being sent for the Association and Club

Email notifications for Association and Club Administrators can be set up from the **Contacts** page where if the **Registrations** box is ticked and a valid email address has been entered in for a particular contact, they will receive email notifications of registrations (shown over the page).

The **Contacts** menu can be accessed from the dashboard screen of your database (the screen that opens up when you first access your database)
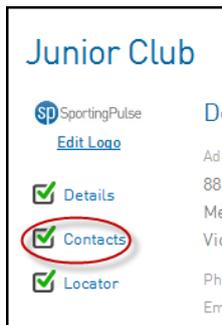
Ticking the **Registrations** box as shown below will then mean that email address will receive notifications regarding registrations, re-registrations and purchases.
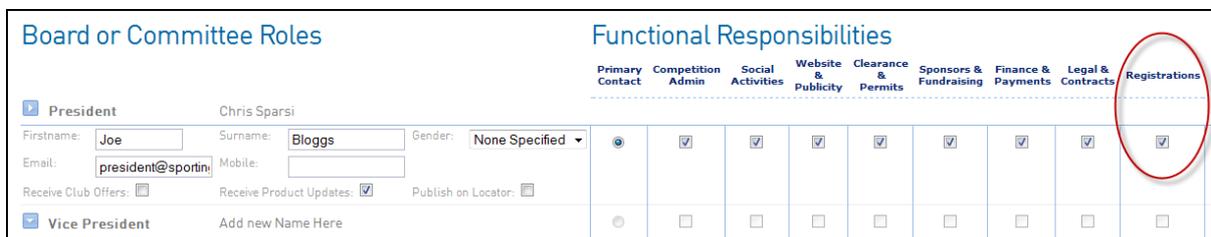
Multi-Registrations and Payments Functionality

This system allows a single user to register multiple people and also allows you to offer registration products at different prices depending on the number of people being registered at one time, in the one transaction. This system is of particular use if your club or league wishes to offer family discounts for subsequent children or adults on their memberships.

1. To activate the multi-reg system for a registration form, go into the Registration Form section and click on **Edit** next to the form you wish to turn multi-reg on.
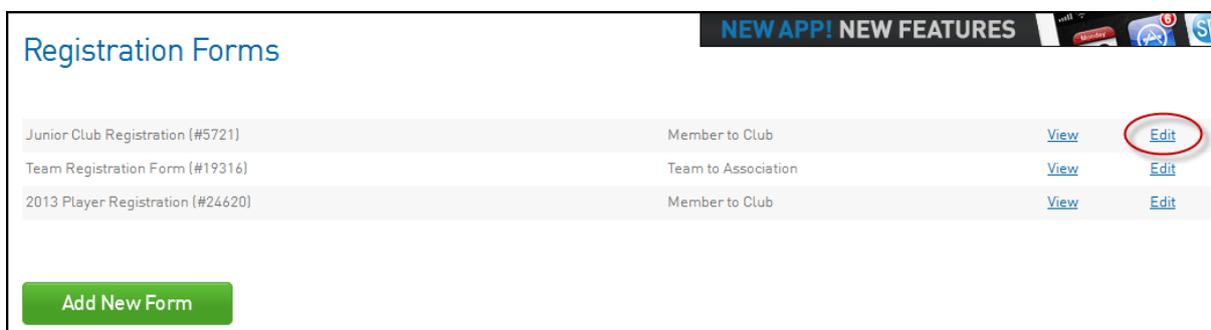
2. In the **Settings** menu you can tick whether you want people to be able to register *Multiple Adults* and/or *Multiple Children* using this form.

3. To save these changes to the form click **Save**

To most effectively use this system, activate the multi-reg system for a form and then attach a <u>multiple pricing</u> product to it meaning that subsequent adults and/or children that are registered as part of the single transaction are offered a discount.

Below is what a user will see when they complete a form with multi-reg activated.

At the first screen of the registration form (shown below) they will be given the option to select how many members they wish to register (provided these options have been ticked in the **Settings** screen).

They can then complete the form as per usual for the first person they are registering.

Once a product has been selected and the **confirm** button has been clicked the process will then take the user back to the beginning of the Registration Form where they will be able to register the second adult/child. It will display what stage of the registration process the user is up to (ie. *Registering Child 2 (of 2)* as shown over the page*)*

The user will then be able to go through the registration form (fields like address, suburb, post code etc. will be pre-filled so they won't have to be filled out twice). Once they hit the **Confirm** button it will take the user through to the **Summary** screen which outlines details for their registration as well as payment details.

Thank you, we have registered you in **Junior Club**.

We have allocated you a username and password and your registration is now complete subject to any relevant registration fees.

Joe Bloggs

Username: 19091158

Password: 44elvb8s

John Smith

Username: 19091148

Password: 92u455mj

Please take a note of these details. They have been emailed to you.

Pay your entry online now

Invoice Number	Item	Name	Price
133031476	multi price	Joe Bloggs	$40.00
133031310	multi price	John Smith	$50.00
133031484	PROCESSING FEE	Joe Bloggs	$3.51
Total			**$93.51**

Please only click the PAY NOW button ONCE

VISA **MasterCard**

We prefer Mastercard

Pay Now

Clicking the **Pay Now** button will take the user through to the Credit Card payment gateway where they are able to pay for their registration. Should users not wish to pay online they can simply close the browser. This will still register the member, they will just have an unpaid transaction on their record.

It is also important to note that this will only work correctly if the user does the above in a single session. There is no option to save and then quit part way through the session and then return and complete it at a later stage.

For further information on how to set up Multi-Priced products <u>click here</u>.

Add a Manual Payment to a Member Record

Should a member not wish to pay for their registration fee a manual payment record can be attached to the member's record.

To add a Manual Payment to a member record:

1. Hover over **Members** in the top menu and click on **Members**
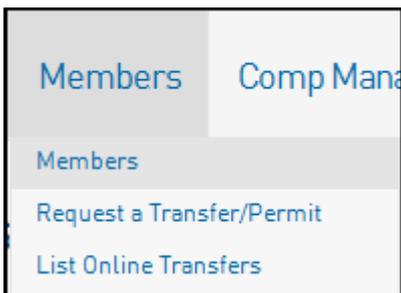
2. Locate the player whose record you wish to update and click through into their record.

3. Click on the **Transactions** menu across the top
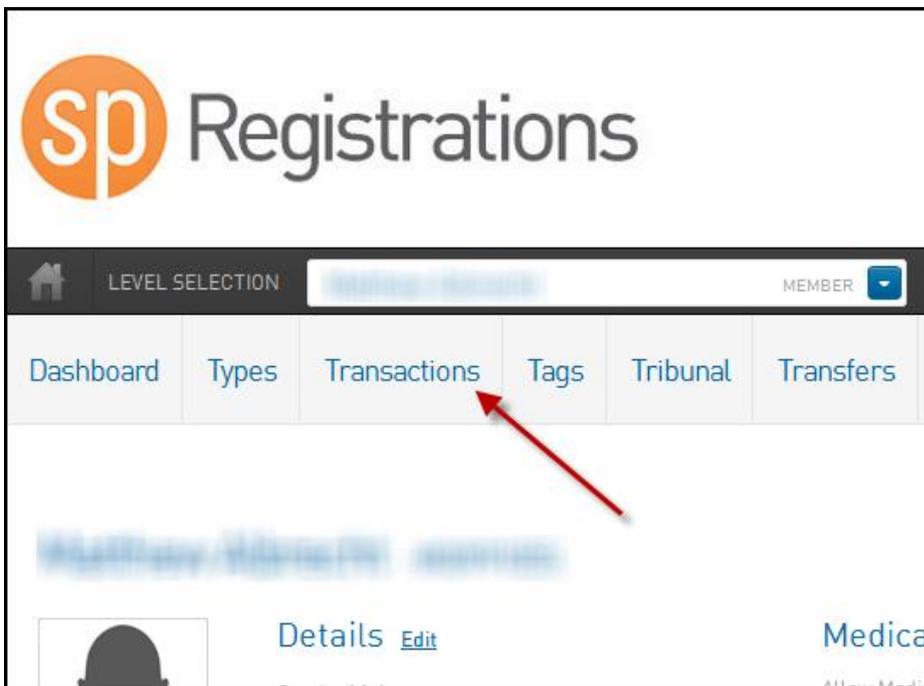
The Transactions page will then list all transactions for the selected player

4. Tick the **Pay** box for the Registration Fee you wish to mark as being paid then field out the details under the Manual Payment section, including the **Payment Type** (ie. Cash, Cheque etc.) and the **Amount**

5. Once fields have been filled out click the **Submit Manual Payment** button at the bottom of the page

6. Review the payment details and click the **Confirm Payment** button to mark the product as **Paid** and set the player as **Financial**

How to View Players Opt-In Settings

You can check individual player Opt-Ins and whether they have agreed to Terms & Conditions by following the below instructions.

1. From the dashboard menu hover over **members** and click **List Members**

2. Click the **Magnifying Glass** to the left of the name of the member that you want to view
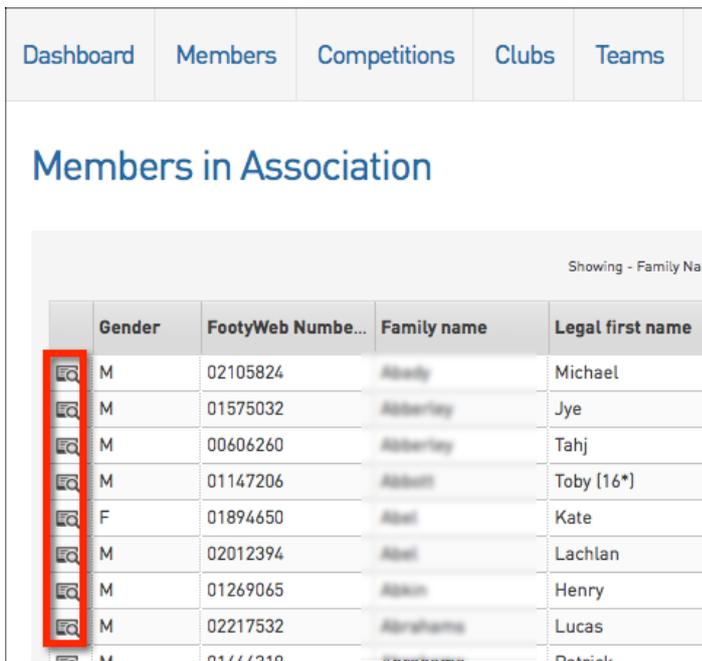
3. From the members menu click **Preferences**
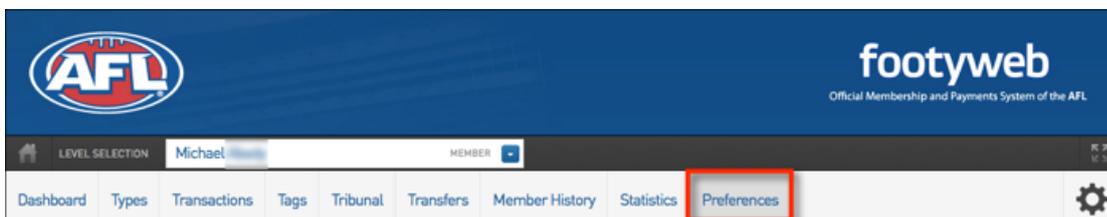
4. You will then see all the **Opt-Ins & Terms and Conditions** that the member has agreed to

Dashboard | Types | Transactions | Tags | Tribunal | Member History | Statistics | Preferences | ⚙

Member Preferences

See your next game and use our maps to get there on time | SportingPulse | Find out more

Opt-Ins

Entity	Entity Type	Description	Action	By	FormID	Date
_____ Australia	National Body	Subscribe to _____ news letters.[Edited]	removed	Bill Batesford	33113	2013-10-14 14:00:44
Geelong ____ Association	Association	I want to subscribe to all the Mary Poppins' publications from Geelong ____ Association.	removed	Bill Batesford	33113	2013-10-14 14:00:44
Victoria	State	This is the optin message for Victoria (the State level for ____). I want to opt in to everything they've got.	accepted	Bill Batesford	33113	2013-10-14 14:00:44

Terms and Conditions

Level	FormID	Date
Sorry there is no data to return		

How to send automated Member Renewal Email

An email can be sent out to all existing members in the database inviting them to re-register to the current season. This will send an email to all members who haven't yet registered to the current registration season.

To send out Member Renewal emails to your members, follow the steps below:

1. Select the past Season
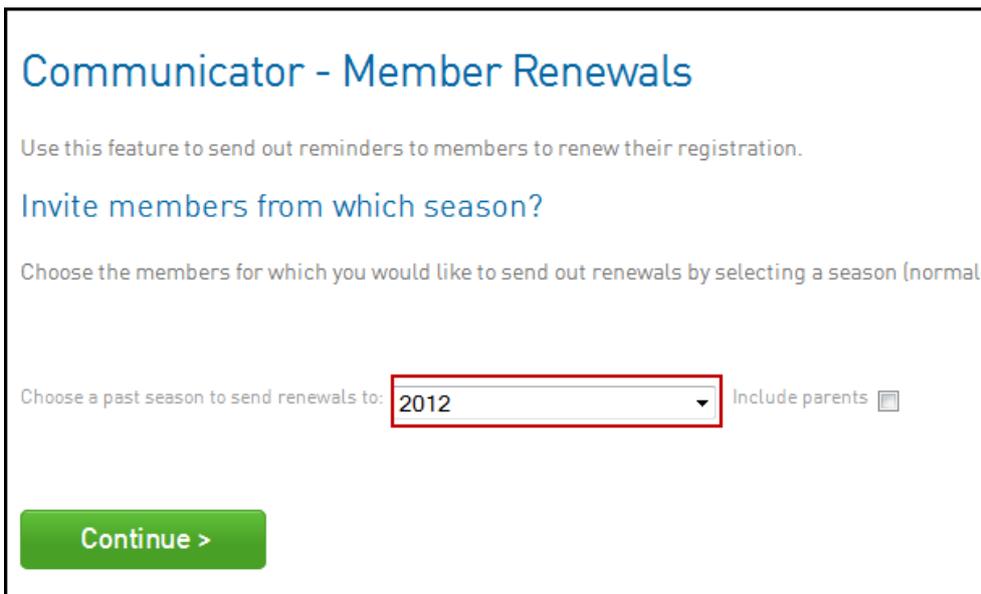
2. Select the Competition(s)
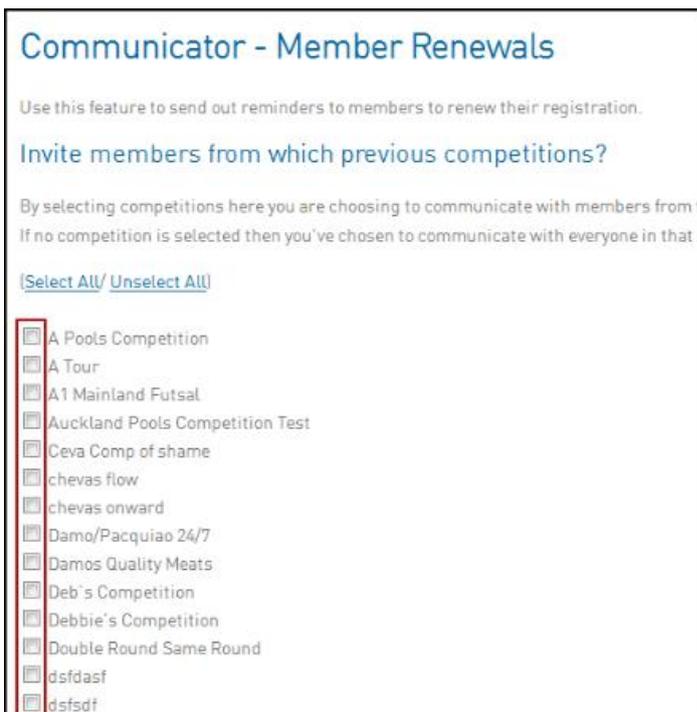
3. Select the Member Registration form

4. Select **Send Emails Now** to proceed.

Below is an example of the content that will be sent out (the email will automatically fill in the 'Member Name', the 'Association Name' and link directly to the registration form).

The box underneath the 'Hi <<Member Name>>' text will allow you to add in any further information to the email that goes out to your members.

*PLEASE NOTE: The click here button is only to be used for **Single Registrations**, it will only allow one member to re-register at a time. If the Registration Form is set to accept Multiple Registrations (ie. Family Discounts) members who wish to re-register more than one child at a time will need to access the Registration Form via a link, rather than from the Member Renewal email.

   5. Click **Send Emails Now** to send out the email to your members

What the Member will see when registering

When your members log in to this Registration Form to register themselves, they will see the screen on the next page as an example of a registration form.

Compulsory fields will be marked with an orange star, products (if displayed on a registration form) will display at the bottom of the form.

Alexandra Hills JAFC

⊘ Choose Type   ⊘ Basic Info   **3. Extra Info**   4. Summary

Personal Details

Legal first name:	John
Family name:	Smith
Date of Birth:	17/10/1963
Gender:	Male
Address Line 1:		⊘
Suburb:		⊘
State:		⊘
Postal Code:		⊘
Phone (Mobile):		⊘
Email:		⊘

Other details

Are you from Aboriginal and/or Torres Strait Islander origin?:	[▾] ⊘
Were you or any of your parents born overseas?:	[▾] ⊘
Middle name:		⊘
Ethnicity:	[▾]
School:	[Select School] ⊘

School Name:

School Suburb :

How often do you watch matches on TV?:

Parent/Guardian Agreement:

One parent born overseas?:

Aboriginal/Torres Strait?:

If yes, Country of Birth?:

Parent/Guardian 1 Email:

Parent/Guardian 1 Phone:

Parent/Guardian 1 Surname:

Parent/Guardian 1 Firstname:

Emergency Contact Number:

Emergency Contact Name:

Phone (Home):

Items

Check the box against the items you would like to select

Select	Name	Cost
Yes	natprod	$25.00

☐ National level optin

☐ I understand that by registering I have agreed to the terms and conditions of participation.

☐ I would like to receive communications and special offers that may include tickets to matches, membership notifications and other promotions from time to time in according with the Australian Football Policy available at http://www.aflcommunity.com.au/privacy

☐ I understand that by registering I have agreed to the Terms and Conditions of participation ⊙

Continue

Pending Registration: How to Approve or Deny

New players that have not previously been registered with another Club in the Footyweb system will be able to register online via the "I am registering to the Club for the first time" link but they will be put in with a **Pending Registration** status. Auskick players joining a Junior Club will be able to register online via the same means and they to will go into a **Pending Registration** status.

It is then the responsibility of the club to **Approve** or **Deny** the registration. To update the member statuses follow the directions below.

1. From the dashboard hover over **Members** and click **Pending Registration**
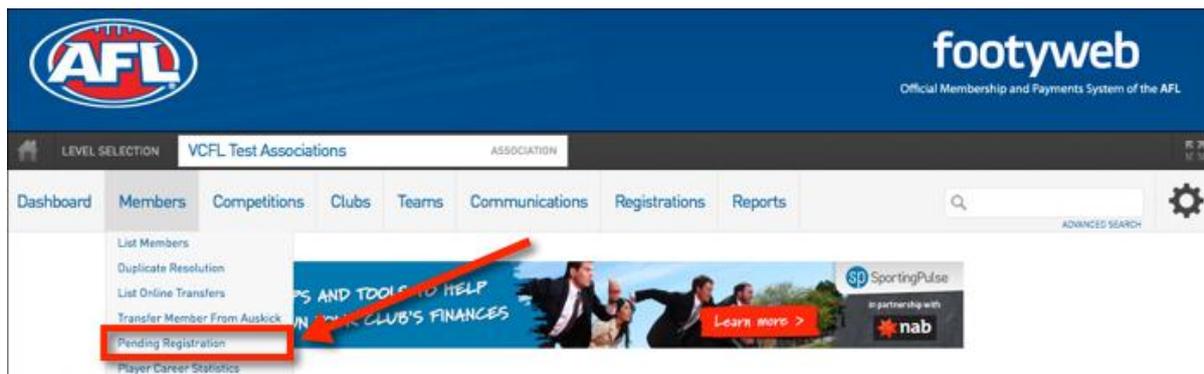
2. You will then be taken to the pending members screen where you will see a list of all pending members.

3. From the **Approve Registration** column click the the pord **Pending,** this will open a drop down box which allows you to choose either **Reject** or **Approve.** If you approve the member they will be added into your club in the current registration season.
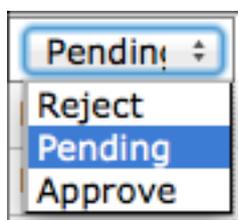
NOTE: Levels above the club will also have access to change the pending status of a member if required.

Contacts & Locator

With the rise of the Internet as the most popular method for finding information, ensuring your club or association is highly visible on the Internet is crucial to promoting your club/association, attracting new members and providing a professional service to your existing members. FOX SPORTS PULSE Membership makes this possible through the Contacts and Locator modules.

As sports administrators we urge you to do what you can to keep your club/ association information up to date. Below are a few tips on how to do so.

When you log into your association or club database the first screen you see is the 'dashboard'. From here you can access and update your association/club's basic details and information (item 1 in the graphic below), Board & Committee member contacts (2) and physical address so that you can be found in your sport's club/ association 'finder' (3).

Details

The 'details' menu allows you to update the basic information on your club/ association including address, phone numbers and email addresses.

Contacts

This module allows clubs and associations to manage the contact details and responsibilities of their administrators. Entering data and contact details into this area will assist administrators by sending them important communications in relation to the area they are responsible for.

To do this click on the **tick box** within the **Functional Responsibilities** area that correlates with the board members responsibility.

Board or Committee Roles

Functional Responsibilities

Role	Name	Primary Contact	Competition Admin	Social Activities	Website & Publicity	Transfer & Permits	Sponsors & Fundraising	Finance & Payments	Legal & Contracts	Registrations
Coordinator	Add new Name Here	○	☐	☐	☐	☐	☐	☐	☐	☐
President	Deion Menzies	○	☐	☐	☐	☐	☐	☐	☐	☐
Development Manager	Add new Name Here	○	☐	☐	☐	☐	☐	☐	☐	☐
Vice President	Tim O'Sullivan	○	☐	☐	☐	☐	☐	☐	☐	☐
Treasurer	Jo Price	○	☐	☐	☐	☐	☐	☐	☐	☐
Secretary	Carmel Gould	○	☐	☐	☐	☐	☐	☐	☐	☐
Registrar	Add new Name Here	○	☐	☐	☐	☐	☐	☐	☐	☐
Committee Member	Cherie Brockwell	○	☐	☐	☐	☐	☐	☐	☐	☐

Locator

The 'locator' is a valuable tool for ensuring that your club/association can be found by potential members/ players through the FOX SPORTS PULSE 'locator' which will be displayed on www.playafl.com.au. Entering your playing venue location details into the locator section in Membership will ensure that when someone uses the locator to search for a club, yours will appear in the results along with the club's contact information. Below is another example of a sport's 'Locator' on the FOX SPORTS PULSE website and the results that are returned when a postcode or suburb is entered.
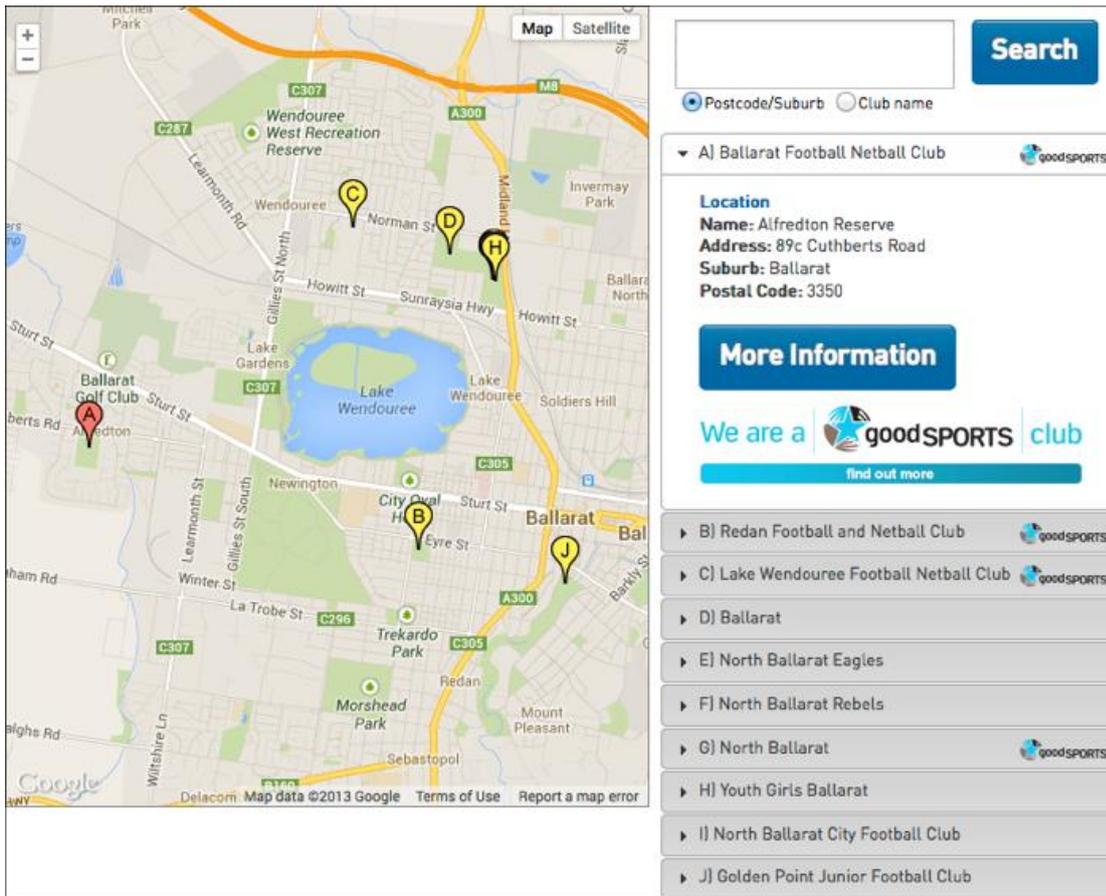
How do I Send Communications to My Members

The process for sending a message consists of the following steps:

1. Specify recipients
2. Select a mode of communication
3. Compose message

Specify Recipients

1. From the association, club or team level of Membership, click on **Communications** in the menu.
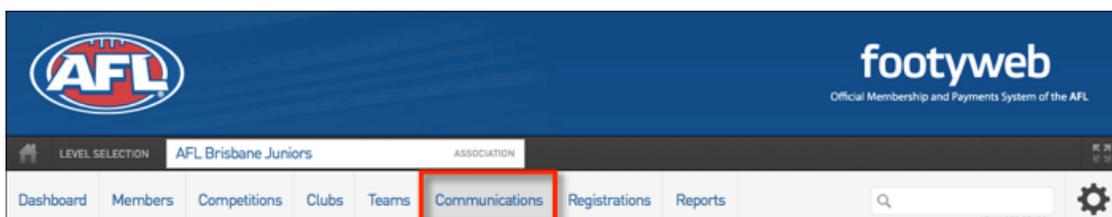
2. The Communicator options will open. Click on **Send a Message**.

3. Three 'recipient options' are available. A description of each is provided below:
   1. Membership Group - select members based on their **member type** (players, coaches, umpires, officials), select administrators from the **club contacts** and/ or select **team contacts.**
   2. Custom Group - select a **custom group** of recipients that you have previously set up
   3. Saved Report - select a **saved member report** that you have previously set up

4. Click on **Membership Group** if you wish to use this option. The Membership Group options will open. Click on the **radio button** to select an option:
   o Club Contacts - click on the **Contact Type** drop-down list select the type of club contacts you want to send the message to.
   o Team Contacts - click on the **For Teams registered in competitions in Season** drop-down list and select a season. This will send the message to teams participating in that season
   o Players - click on the **Registered in Season** drop-down list and select a season. This will send the message to players registered in that season. Click on the **Include parents** check box to also include players' parents as recipients.
   o Coaches - click on the **Registered in Season** drop-down list and select a season. This will send the message to coaches registered in that season.

- o Umpires - click on the **Registered in Season** drop-down list and select a season. This will send the message to umpires registered in that season.
- o Officials - this will send the message to all officials in your database

Click on **Custom Group** if you wish to use this option. Click on the **Groups** drop-down list and select the group that you want to send the message to.

Click on **Saved Report** if you wish to use this option. Click on the **Reports** drop-down list and select the saved member report that contains the recipients that you want to send the message to.

Tip: If you obtain permission from members to send them communications, you can use the 'mailing list' field to manage those that do/ do not want to receive communications. If you use the Mailing List field, be sure to include it in your custom report (eg. Mailing List = 'Yes').

Once you have selected your recipient option and specified the settings for that option, click on **Continue**.

Select a Communication Method

1. The 'Confirm Recipients' screen will appear, which contains:
   o A message at the top of screen confirming the recipient option that you have chosen
   o The communication methods available - choose whether to send the message via **SMS**, **Email** or **Combo**. The 'Combo' option will send an SMS to all recipients with a mobile number and an email to recipients that have an email address but no mobile number.
   o A 'Contact Summary' of the recipients, which shows the total number of recipients and a breakdown by mode of communication available - the number of recipients that can be contacted by email, mobile phone, email and mobile phone, or email only (no mobile phone). These figures help identify the number of emails/ SMS messages that will be sent out

2. Click on the communication method that you wish to use - **SMS**, **Email** or **Combo**.

The Reporting System

The Reporting system is a powerful tool that will allow you to customise all sorts of reports based on the information that you require.

To access the Reports system:

1. Click on the **Reports** menu across the top

You'll then see the screen below where you can select a category for the report you wish to run (members is generally the most common run report).
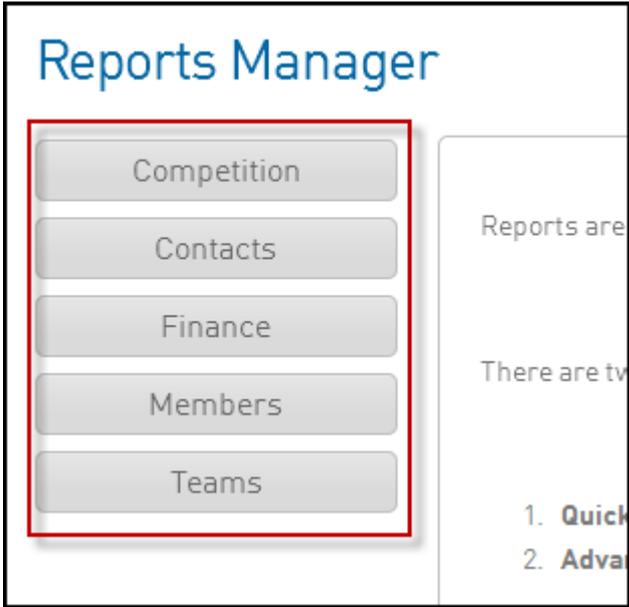
To run a basic Advanced Member report:

1. Click on **Members** (from the above screen shot)

2. Click on the **Configure** button for the **Advanced Member Report**
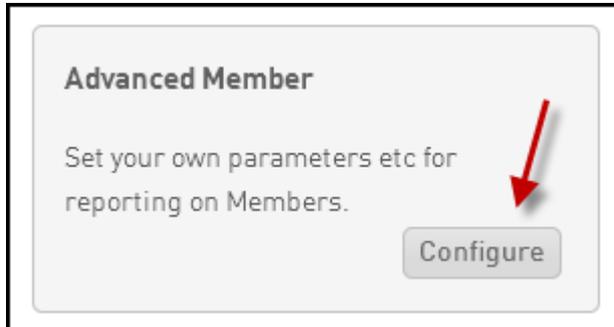
3. Click and drag across the fields that you would like to report on
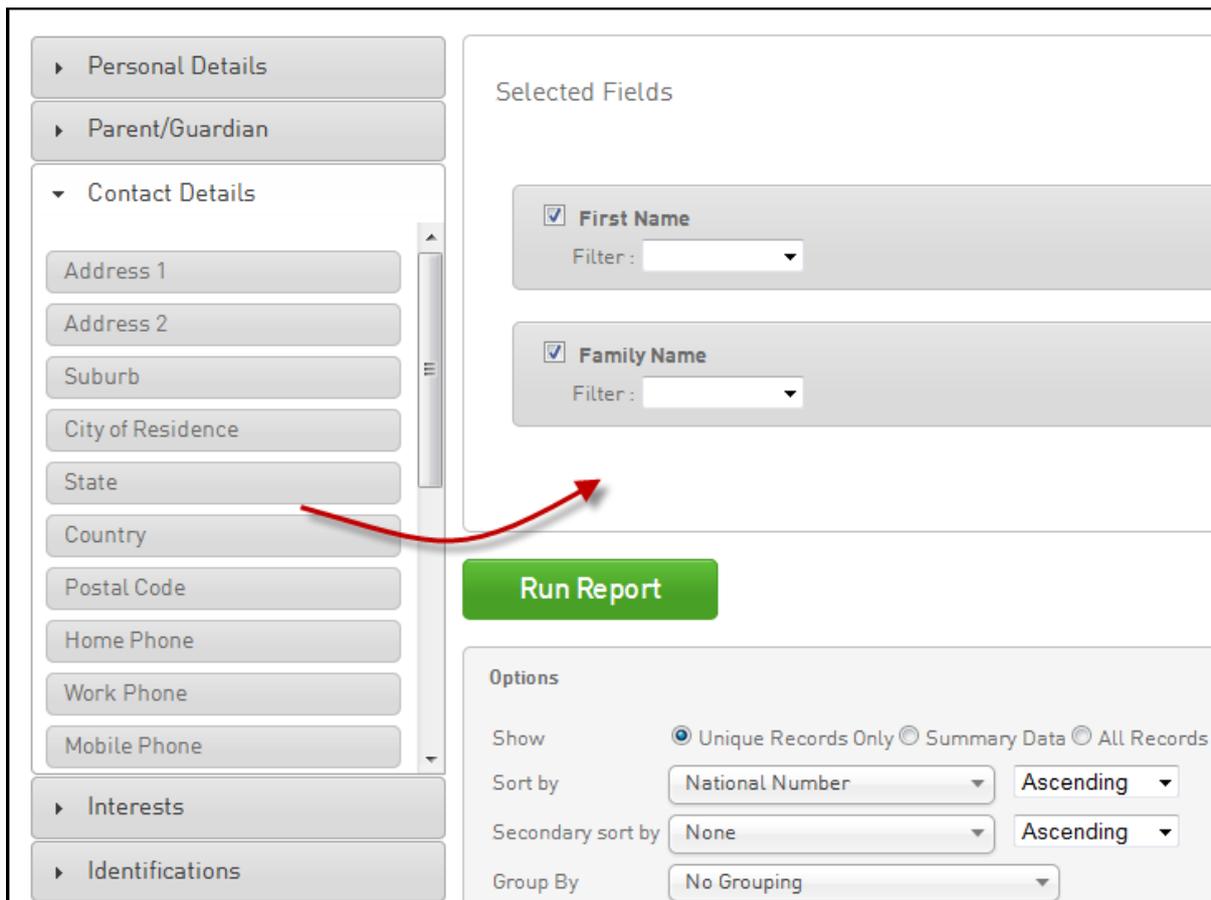
4. Click on **Run Report** to generate the report

You will be able to apply a filter to your reports so you can report on specific information. For example, the screen shot below will only report on members that are assigned to the 2013 season.
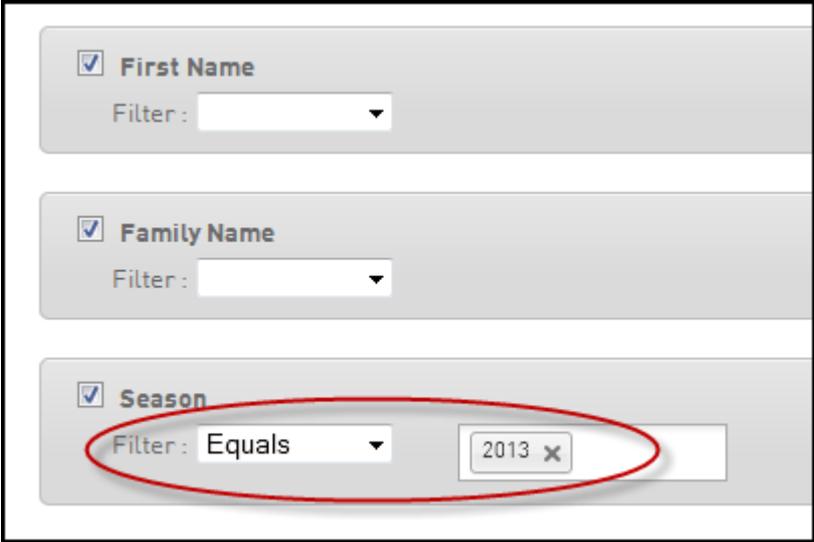
Common Financial Reports

Funds Received Report

This is the best report to run to determine all monies that the affiliate physically has received into their bank account or PayPal account. This would be the best report to run to reconcile payments that have gone through to a bank account or PayPal account.

Common Fields to use in this report:

Product: Displays the product(s) that have been setup and purchased by members.

Payment For: Displays which Member or Team the payment is for.

Payment Date: Displays the date that the payment was made by the Member or Team.

Date Funds Received: Displays the date that the monies from a member were physically received by the Affiliate or Club.

Transaction Amount: Displays the dollar amount of the transaction.

Money Received (after fees): Displays the exact amount the Affiliate or Club will receive from the transaction, with the transactional fees subtracted.

Best Filters to use in this report:

Product: Select 'Equals' from the Filter drop box and select the specific Product that you wish to display and report on.

Date Funds Received or Payment Date: Select either 'Equals', 'Less Than', 'More Than' or 'Between' and select the specific date or date range that you wish to report on.

Transactions Report

This is the best report to run to see all member payment transactions that have taken place through the system. The key element of this report is the 'Transaction Status' field which will state whether a member has paid or not paid ("unpaid") for a product.

Common Fields to use in this report:

Product: Displays the product(s) that have been purchased by members.

Payment For: Displays which Member or Team the payment is for.

Amount Due: Displays the dollar amount for the individual transactions a member or team has purchased (**Note**: This field should be used in favour of the Payment Amount field).

Transaction Date: Displays the date a Member or Team has gone through and completed the registration form, prior to the payment being made. (**Note:** The Transaction Date field will only populate information if a product is selected by the member)

Payment Date: Displays the date that the payment was made by the Member or Team.

Transaction Status: Displays whether a selected product has been paid for or not ('Paid' or 'Unpaid').

Payment Type: Displays the how the Payment was made (ie. Online NAB, Online PayPal, Manual Payment etc).

Best Filters to use in this report:

Product: Select 'Equals' from the Filter drop box and select the specific Product that you wish to display and report on.

Transaction Date: Select either 'Equals', 'Less Than', 'More Than' or 'Between' and select the specific Transaction Date or Date range that you wish to report on.

Payment Date: Select either 'Equals', 'Less Than', 'More Than' or 'Between' and select the specific Payment Date or Date range that you wish to report on.

Transaction Status: Select 'Equals' from the Filter drop box and select 'Paid', 'Unpaid' or 'Cancelled' from the drop down list to report on those specific transactions.

Payment Type: Select 'Equals' from the Filter drop box and select the specific Payment Type (ie. Online NAB, Cash, Cheque etc) that you wish to report on.

Useful Report Settings and Examples

Example Report: Teams registered to the current season

1. Click on **Reports**
2. Click on **Teams** then click **Configure** for the **Advanced Team** report
3. Click and drag across the fields as shown below

4. Make sure the **Season** filter is set to **Equals** and you select the particular season you wish to report on

5. Click **Run Report** to view the report

Example Report: Teams or Members with unpaid products/registration fees

1. Click on **Reports**
2. Click on **Finance** then click **Configure** for the **Transactions** report
3. Click and drag across the fields as shown below
4. Make sure the **Transaction Status** filter is set to **Equals** and you select **Unpaid** from the drop down list

5. Click **Run Report** to view the report

Example Report: Reporting on what products a Member has purchased and paid for

1. Click on **Reports**
2. Click on **Members** then click **Configure** for the **Advanced Member** report
3. Click and drag across the fields as shown below
4. Make sure the **Transaction Status** filter is set to **Equals** and you select **Paid** from the drop down list
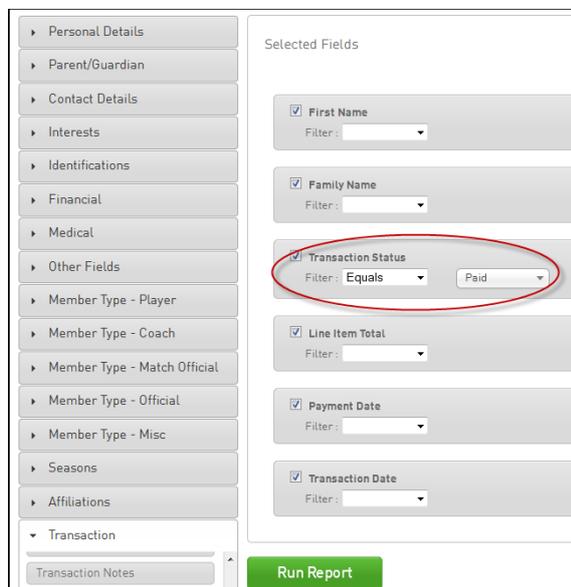
5. Click **Run Report** to view the report

Player Username & Password Report

During the registration period it is a good idea for clubs to have a list of their players **username & passwords.** This will help administrators aid their potential members during the registration period.

Every database has a saved report called '2013 Player Usernames & Passwords' to access this report follow the below steps.

1. The first step in the process to find your previous members username & passwords is to click on **Reports** from the dashboard menu
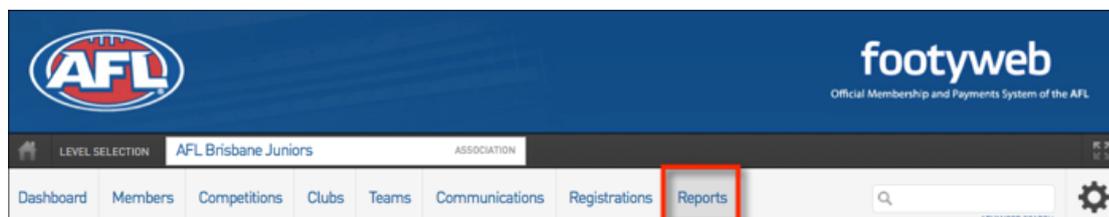
2. From the **Reports Manager** menu click **Members**

Reports Manager

Clubs

Competition

Contacts

Finance

Members

Teams

Transfers

Tribunal
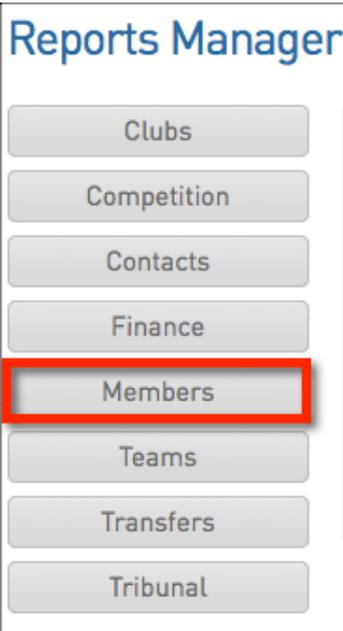
3. Then you will need to click **Configure** from within the **Advanced Member** box

Members

Advanced Member

Set your own parameters etc for reporting on Members.

Configure

Retention Report

Set your own parameters etc for reporting on Member Retention

Configure

Duplicates Summary

Set your own parameters etc for reporting on how many duplicates there are in each organisation.

Configure
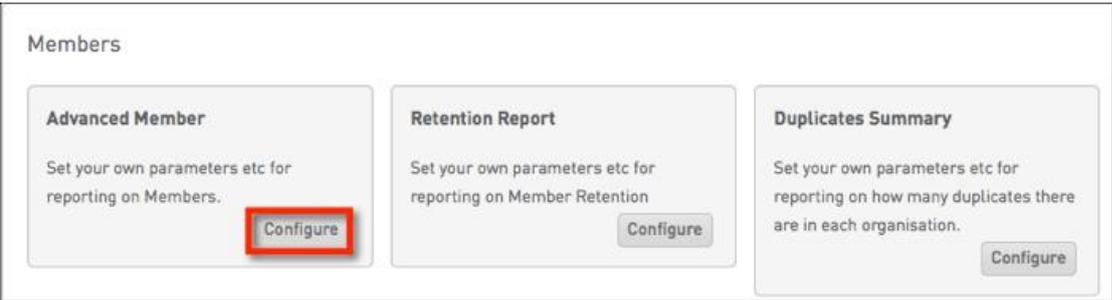
4. Scroll to the bottom of the page and you will see the **Saved Reports** section. From the drop down box select **2013 Player Usernames & Passwords** and click **Run**

5. Your report will then open in a new tab

First Name	Family Name	Date of Birth	Address 1	Suburb	Postal Code	State	Email	Mobile Phone	Username	Password
Daniel		19/08/1995		Brown Hill	3350	Vic	mail.com	0467	157290	rgjol
Martin		08/04/1985		Ballarat	3350	Vic	.com	0417	124828	k2djc
Simon		07/08/1983		Nerrina	3350	VIC	@hotmail.com	0408	129665	mba4t
Benjamin		23/08/1992		Delacombe	3356	VIC	ond.com	0429	129870	zztm1y
Chris		21/10/1986		Ballarat	3350	VIC	com	0409	129665	qntt4

Online Registrations and Payments Quick Checklist

A quick 6 step guide on what needs to be done to take Online Registrations and Payments:

1. Apply to become a FOX SPORTS PULSE Sub-merchant
2. Open an NAB Business Cheque Account
3. Create/Edit a form (member to Association/Club/Team etc)
4. Create your Products (i.e. playing fees etc.)
5. Link your Products to the appropriate Registration Forms
6. Link your Registration Forms to your website
7. Start taking registrations online

Quick Summary of How the Online Registration process will work:

Member to Club

1. Member fills in registration form

2. Member selects and pays for products (If Club is accepting online payments)

3. Confirmation email is sent by FOX SPORTS PULSE confirming application and payment

The appropriate pricing scheme will also need to be applied as set out in Section 7 and 9.

Contact

For further information or assistance with the Online Registration and Payments program, please contact the following;

FOX SPORTS PULSE Support Enquiries
Support Website: www.support.foxsportspulse.com
Support Phone: 1300 139 970 (AUS) or 0800 808 202 (NZ)

AFL
Contact: Tony Costanzo
Phone: 0409 691 969
Email: t.costanzo@foxsportspulse.com

FOX SPORTS PULSE Payments
Contact: Craig Hood
Phone: 0411 129 313
Email: c.hood@foxsportspulse.com

Co-Ordinator Checklist

☐ Have you linked your registration form to the National form? If not, refer to page 5 'How to Link Registration Form to National Form'

☐ Have you marked your primary form? If not, refer to page 7 'Mark Form as Primary'

☐ Have you added all your Terms & Conditions to the National form? If not, refer to page 13 'How to Add Your Own Terms & Conditions'

☐ Have you set up your sub-merchant account? If not, refer to page 15 'How to apply to become a FOX SPORTS PULSE Sub-merchant'

☐ Have you added your new products and attached them to your registration form? If not, refer to page 19 'How to Create a New Product'

☐ Have you put your registration form on your website? If not, refer to page 8 'Publishing the Registration Form to Your Website'

☐ Have you updated your clubs Contacts, Location & Details section? If not, refer to page 35 called 'Contacts & Locator'

☐ Have you sent out your member renewal emails, If not, refer to page 31 'How to send automated Member Renewal Email'

☐ Have you printed out the Username & Password report for your members? If not, refer to page 48 'Player Username & Password Report'

User Stories

Current Player (Automatic)

This is the process for players registering themselves via the registration link that they have received in an email.
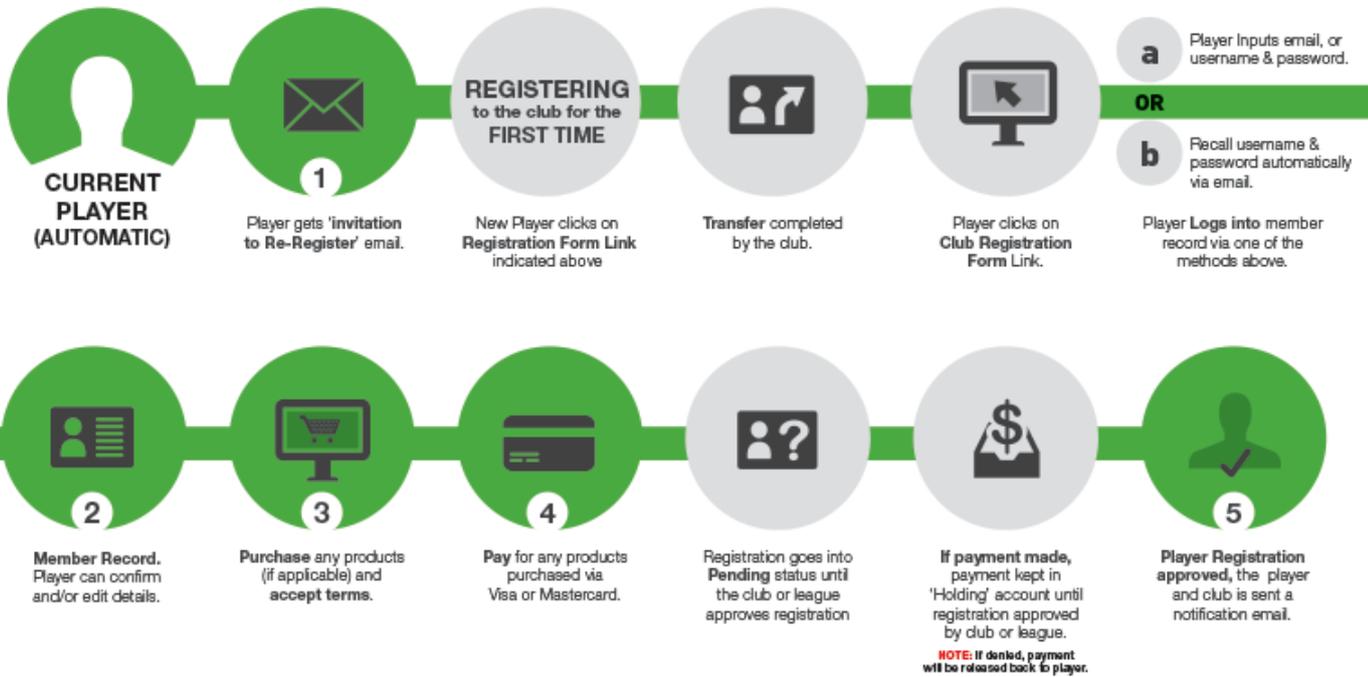
Current Player (Manual)

This is the process existing players will take if accessing the registration form through a link supplied on the website.

New Player

This is the process that a new potential member would take to register into your club.

NEW PLAYER

1. Player gets '**invitation to Re-Register**' email.

New Player clicks on **Registration Form Link** indicated above

REGISTERING to the club for the **FIRST TIME**
1

Transfer completed by the club.

Player clicks on **Club Registration Form** Link.

a Player Inputs email, or username & password.

OR

b Recall username & password automatically via email.

Player **Logs into** member record via one of the methods above.

2 **Member Record.** Player can confirm and/or edit details.

3 **Purchase** any products (if applicable) and **accept terms**.

4 **Pay** for any products purchased via Visa or Mastercard.

5 Registration goes into **Pending** status until the club or league approves registration

6 **If payment made,** payment kept in 'Holding' account until registration approved by club or league.
NOTE: If denied, payment will be released back to player.

7 **Player Registration approved** or **denied,** the player and club is sent a notification email.

Transferred Player

This is the process that must take place for a transferred player to be registered into a new club.

TRANSFERRED PLAYER

Player gets '**invitation to Re-Register**' email.

New Player clicks on **Registration Form Link** indicated above

REGISTERING to the club for the **FIRST TIME**

1 **Transfer** completed by the club.

2 Player clicks on **Club Registration Form** Link.

a Player Inputs email, or username & password.

OR **3**

b Recall username & password automatically via email.

Player **Logs into** member record via one of the methods above.

4 **Member Record.** Player can confirm and/or edit details.

5 **Purchase** any products (if applicable) and **accept terms.**

6 **Pay** for any products purchased via Visa or Mastercard.

Registration goes into **Pending** status until the club or league approves registration

If payment made, payment kept in 'Holding' account until registration approved by club or league.
NOTE: If denied, payment will be released back to player.

7 **Player Registration approved,** the player and club is sent a notification email.

Club Registration Workflow

This is the process that clubs need to follow when setting up online registrations.

CLUB

a Use your current Registration Form.

OR

b Use the National Registration Form

Club chooses which **Registration Form** to mark as 'Primary' for the new season via the above means.

Clubs can further **customise** their forms by adding extra fields and terms & conditions.

Clubs can **add products** and attach to the reg form. (ie 2014 Subs, Shorts, Socks, etc)

Clubs can apply for a **Merchant Account** to accept **Online Payments** from their members

Clubs can choose to make online payments **compulsory**.

Send an '**invitation to Re-Register**' to club members from previous season

OR

Add a **link** to the Reg Form on the club or League website

Begin **Annual Registration** process via one of the above means.

Registration and Payments will now begin to flow through to the new season.